



Building a Client Base: Referral Networks and Local Marketing Campaigns

Building a Referral Network

Community or faith-based organizations without a large client base, but with the necessary volunteer, technology, and space capacity can successfully implement TBB™-NC by building a referral network. By identifying and reaching out to churches, health and counseling organizations, youth and mentoring programs, and other community and faith-based organizations that come into contact with moderate-income families, a referral network can begin to be built.

Work with your [Regional Coordinator](#) to introduce TBB-NC to these potential partners explaining the possible benefit to the people served by their organizations. Inform them how to use the Quick Check screening tool, provide them with literature about TBB-NC and your organization and encourage them to direct potential clients to your organization. Successful partnerships are reciprocal. Learn about partner organization's programs and refer your clients to them. Consider doing joint events like a tax clinic during tax time and find other ways to partner.

Promoting and Advertising TBB-NC

While MDC, the manager of TBB-NC, does conduct statewide marketing of TBB-NC services, the most effective way to draw moderate-income families to your site to receive help completing benefits applications and or taxes is through a local marketing campaign. In addition to TBB-NC's standard marketing materials (Postcards, Fliers, Brochures, etc.), the [Marketing and Outreach Center](#) of the [TBB-NC website](#) also includes a number of Templates and Examples for Local Marketing Campaigns.

Template Documents and Examples are available for Press Releases, Fact Sheets, Newsletter Inserts, and Public Service Announcements for radio, and Email Blast Templates for email marketing. The Template document provides a general format and some standard language and room to add your organization's specific information and logo. The Examples are meant to show you what the templates will look like. The Templates are a starting place and are meant to be modified. For Example: The Fact Sheet Template describes a Free Tax Preparation event; however the same basic template can be used for a Benefit Clinic or any other event your organization is putting on by simply modifying the language.

For more information read *A Guide to TBB-NC Marketing Materials* found [Marketing and Outreach Center](#) of the [TBB-NC website](#) which provides a comprehensive overview of each marketing material and template document and its intended use.

Checklist for a thorough Local Marketing Campaign

- ❑ **Set a Goal, Host an Event, or Make an Announcement:** An effective marketing campaign has a hook that draws attention and makes the campaign newsworthy. The opening of a tax clinic for the new tax season, the training of volunteers and the offering of new services, or a 'promotional campaign' for a holiday, awareness month, release of a new report or statistics and a corresponding organization-wide goal to connect 50 eligible working families to Medicaid in a defined time frame are all ways to give a marketing campaign a theme or message that could resonate in your community.

- ❑ **Send a Fact Sheet or News Release with pictures to local newspapers:** Local newspapers and media often have community events or announcements section. Write up a simple Fact Sheet with all the important information (Who, What, When, Where, How) and send it to your local paper with attached pictures (don't put the pictures in a Word document!). A news release serves the same function, but it is in a story or article form and includes quotes. Templates can be found in the [Marketing and Outreach Center](#) of the [TBB-NC website](#) to get you started. Your local newspapers' contact info can likely be found on their website. The [US Newspaper List](#) includes the names and links to all newspapers, radio stations, and TV stations by state. Don't be afraid to call the newspapers main office if you have questions. After reaching a goal or an event, send another news release with details about clients served with a few quotes from people at the event and your organization's director. The newspaper might have a reporter contact you and write-up a story about your organization and the goal or event.

- ❑ **Send in a Public Service Announcement to the local radio station:** Local radio stations will often read Public Service Announcements on the air. Craft a short, 30-sec paragraph that can be easily read with all the important information. A template can be found in the [Marketing and Outreach Center](#) of the [TBB-NC website](#).

- ❑ **Send out the newsletter insert to local faith-based and community organizations:** Most churches and organizations communicate with their members through regular newsletters. Craft a short paragraph that can be easily inserted into a newsletter with all the important information. A template can be found in the [Marketing and Outreach Center](#) of the [TBB-NC website](#) that provides some standard language. Send the organization's administrative assistant who is likely in charge of the newsletter or knows who puts it together. Most organizations are always looking for relevant information to put into their newsletters to help their members/clients.

- ❑ **Hand Deliver and Post Fliers around the Community:** Many community organizations and gathering spots like grocery stores, coffee shops, libraries, community centers, schools, hospitals, and doctor's offices have bulletin boards where community fliers can be posted. Make a list of likely places and hand deliver fliers to be posted. A large

number of fliers for specific supports and TBB-NC in general can be found in the [Marketing and Outreach Center](#) of the [TBB-NC website](#).

- **Encourage Partner and Community Organizations to send out an Email Blast:** In addition to the traditional forms of marketing through newsletters and fliers, many organizations now have email lists of members who receive updates from them. The Email Blast Templates available in the [Marketing and Outreach Center](#) of the [TBB-NC website](#) provide basic information about TBB-NC for an email format. Customize the template for your organization and ask partner and community organizations to make their members aware of the free service offered by TBB-NC. On the Self-Serve Email Blast Template, the picture that forms the header of the email can be linked to your organization's unique Self-Serve Partner URL making an email blast an easy way to market Self-Serve access to potential clients at partner or community organizations.

- **Contact Employers:** Employers can provide information easily to their workers through fliers in the workplace or by sending out an email blast. Target employers with employees that would likely benefit from TBB-NC services and contact the manager. If your organization does not have a contact at the employer wait until a news release or public service announcement has run in the local newspaper or on the local radio station to show that your outreach to the company is part of a larger marketing strategy.

Resources:

Read more on *How to: Generate media and improve your outreach* from Jake Lynch of the Rails-to-Trails Conservancy at <http://www.railstotrails.org/news/features/mediaoutreach.html>